

NZOHNA

Mentoring Framework



NZOHNA

NEW ZEALAND OCCUPATIONAL HEALTH NURSES ASSOCIATION

Contents

Contents	1
Acknowledgement	3
Introduction	4
Section 1	5
Introduction	6
How does NZOHNA support mentoring and coaching?	6
Role Models and Professional Practice	6
Mentoring and Coaching	7
Coaching versus mentoring	7
Do I need a mentor or a coach?	7
Why we need Mentors	8
The History of Mentoring	9
What is mentoring?	9
Models of mentoring	10
Directive and non-directive behaviour within mentoring	12
Formal and informal mentoring arrangements	12
Mentoring Programme Structure	13
What are the benefits of mentoring?	15
Foundation Principles for Mentoring Programmes	16
Potential pitfalls in establishing a formal mentoring programme	20
Characteristics of effective mentoring	21
Effective Mentee	23
Development Offerings for Mentors/Mentees	24
Getting Started	24
Who can be a Mentor	24
Finding a mentor	25
Formal mentoring programmes	25
Mentor Matching	25
Informal mentoring arrangements	26
Phases of a mentoring relationship	27

Stages in a Mentoring Relationship	28
Mentor vs Counsellor	30
Mentor vs Manager/Supervisor	30
Dealing with conflict	31
Ending the relationship	31
If the relationship isn't working	31
Planned separation and redefinition	32
Evaluation	32
Competencies of a Mentor	32
Competencies of a Mentee	34
Evaluation	35
Section 2	37
What is Coaching?	37
Leader/Manager as coach	37
Executive coaching	38
Section 3	39
Mentoring and Coaching Model	39
Effective Coaching and Mentoring Questions	40
Follow-up and Feedback/forward for progress meeting and coaching moments	42
Coaching and Mentoring Skills	43
References, websites and further reading	46
Appendices	47
Appendix A – Defining Mentee's Expectations for the Mentoring relationship	47
Appendix B - Defining Mentor's Expectations for the Mentoring Relationship	48
Appendix C - Mentoring Diary Sheet	49
Appendix D - Mentoring Progress plan	50
Appendix E - Conversation Starters	55
Appendix F - Mentoring agreement	56
Appendix G - Mentoring application form	57
Appendix H - Mentoring Process	58

Acknowledgement

We would like to acknowledge NZOHNA for their support with the Mentoring Framework and the Taranaki Occupational Health Nurses for their experience and input to our survey. We also acknowledge the following persons; Carolyn Haybittle, Shona Jackson and Meghan Fairey

Introduction

How does NZOHNA support mentoring and coaching?

Mentoring and Coaching

Coaching versus mentoring

Do I need a mentor or coach?



Section 1

What is mentoring?

Formal and informal mentoring arrangements

Mentoring programme structures

- One-to-one mentoring
- Peer to peer mentoring
- Group mentoring
- Team mentoring
- Bifocal mentoring
- Reverse mentoring

What are the benefits of mentoring

- Potential benefits for mentees
- Potential benefits for mentors
- Potential benefits for NZOHNA

Foundation principles for mentoring programmes

- Potential pitfall in establishing a formal mentoring programme

Characteristics of effective mentoring

- Effective mentors
- Effective mentees

Competencies of Mentors

Development offering of mentors/mentees

Getting started

- Finding a mentor
- Formal mentoring programmes
- Mentor matching
- Informal mentoring arrangements

Phases of a mentoring relationship

- The first meeting/session
- Developing and maintaining the mentoring relationship
- Ongoing meetings/sessions
- Suggested meeting format

Ending the relationship

Evaluation

Introduction

This Mentoring and Coaching Resource has been developed by the Taranaki Branch to support the Professional and personal development of NZOHNA members in the key areas of teaching and learning, research and Professional development therefore to enhance the quality of nurses' work environment and the quality of nursing practice.

It is a generic resource to provide information to:

- support mentors and mentees so that they get the most benefit from their mentoring relationship
- assist NZOHNA members in the setup of formal mentoring programmes
- initiate an informal mentoring relationship for themselves as a mentee and for those who are requested to be a mentor
- explore the use of coaching within the Association
- access an external executive supervision coach.
- to promote health and safety work environments to help mentees achieve excellence in their professional practice.

How does NZOHNA support mentoring and coaching?

This resource has been compiled to provide guidelines and supporting documentation to assist with both mentoring and coaching practice. The resource is a guide in shaping quality professional practice environments for Nurses, so that they can continue to provide safe, ethical and competent practice in their workplaces.

Section 1 covers mentoring in its various forms and outlines design and delivery of mentoring programmes and the attributes of both mentors and mentees to ensure successful mentoring practice.

Section 2 is an overview of coaching within NZOHNA provides courses for identified members to improve their coaching capability. and to focus on the development of competencies for mentors.

Role Models and Professional Practice

Nurses learn throughout their careers, they learn from ongoing professional development programmes, post graduate studies, their places of work and most importantly they learn from each other. Nurses have a professional obligation to support other nurses in developing and refining competencies required for safe, ethical and effective work practice. Nurses also have the responsibility to support the development of colleagues who are new to the profession of Occupational Health.

Mentoring and Coaching

The terms “mentoring” and “coaching” are often used interchangeably. However, while both focus on learning and development there are many different views about the difference between coaching and mentoring.

Coaching is usually seen to have more of an emphasis on performance.

Other important differences relate to the roles of coaches and mentors,

the latter being usually a more experienced person, often chosen for their expertise in a relevant field. A mentor may incorporate coaching techniques but will often share their experience and be able to direct their mentee to relevant resources or to open particular doors.

The main differences tend to be that:

- mentoring can be more directive
- a mentor tends to be more experienced than the mentee
- advice and guidance is often given to support mentee development

Coaching versus mentoring

Opening perspectives and learning

“A coach is someone available for the performer to learn WITH”

“A mentor is someone available for the performer to learn FROM”

Coaching involves timely feedback on performance, to enhance skills and qualities for success. (Fuimano, 2004, Kilcher & Skatis, 2003; Nelson et al., 2004). An example is a preceptor coaching a preceptee a new skill, providing tips and positive feedback.

NZOHNA encourages a mentoring/coaching approach from all members who wish to take part as part of their role in the performance/professional development of other members. Enabling a mentoring and coaching culture by utilising key coaching skills is an integral part of learning and leadership capability development. The resources at the end of this toolkit can be used very successfully by members both academic and professional, as well as mentors and mentees.

Do I need a mentor or a coach?

If your development needs a personalised approach in addition to support provided by your manager, you must decide whether mentoring or coaching is more appropriate for you.

For formal 1:1 mentoring a mentor/mentee relationship is not recommended where there is a direct line of reporting due to potential conflicts of interest. A mentor may provide input that supervisors do not or should not give. For example, a mentor might discuss topics unrelated to the supervisor’s duties, or that would be inappropriate for a supervisor to broach. Conversely a

mentor should not encroach on the staff/ manager/supervisor relationship or operational activities.

Find a Mentor when you want to discuss broad career issues, seek general guidance, or need to clarify development goals, plan your future direction, make decisions or solve problems that are specific to a particular field – eg, resource grant writing. This is especially so within an organisational context.

Mentoring is useful at major transitions in one's career, for example:

- Preparing to step up to a new role
- Support for the first year as an Occupational health Nurse
- Making a transition from individual contributor to a team leader

Mentoring is also useful during:

- Succession planning
- Addressing equity and diversity issues

Get a Coach when you have a well-defined goal that is based on improving specific skills and performance in your current role or you are needing help to define what it is you want to improve. A coach is also useful for raising your self-awareness and confidence; providing 360° assessment feedback and action planning.

Mentors and coaches should be guided by, or abide by the Nursing Code of Ethics.

Why we need Mentors

In Nursing

- For guidance and support
- To structure working environment for learning
- For constructive and honest feedback
- For debriefing related to good/bad experience during placement
- As a link person with other areas
- As a role model
- To assess competence
- As a friend and counsellor
- For encouragement
- To provide the appropriate knowledge base for nursing interventions
- For questioning
- For protection from poor practice
- To build confidence
- For sharing learning, i.e. learning from each other
- To keep skills and knowledge up to date
- For linking theory to practice
- For developing one's work skills in teaching and explaining
- To provide structured learning programmes during practice placement

In personal life

- For the development of one's self
- To share experiences
- For encouragement

- To build up confidence
- For honest opinions and views
- As a role model
- For socialisation
- For support and guidance

Furthermore, van Eps et al. (2006) explored the benefits of mentoring in a study that evaluated students' perceptions of mentorship and concluded that mentorship does enable the development of competent practice, especially if it is founded on supportive longer-term mentor-mentee relationships.

Another reason for mentoring is the concept of work-based learning which incorporates practical skills and knowledge. According to Bandura (1986, 1997) the main features are reflected in the social learning theory which centres on learning skills observing skilled professionals performing them first.

The History of Mentoring

The term 'mentor' dates back to Greek Mythology, Homer's Odyssey in the form of Mentor who was a wise and faithful advisor, entrusted to protect Odysseus's son. Telemachus, while Odysseus sailed against Troy (Ragins and Kram, 2003). History also suggests that mentoring has been used in nursing as far back as Florence Nightingale (Barton, D.S., Crowdy, M. & Hawthorne, B.W., 2005). The nursing profession started its relationship with mentoring in the 1970s when Vance (1977) introduced the concept into literature. In their work, Vance and Olsen (1991) foresaw mentors serving as role models, guides, teachers, coaches or confidants. The 1990s saw a change in mentoring highlighting a teaching-learning environment. "In this light, mentorship was also seen as an opportunity for development and transmission of professional knowledge." (Stewart, B.M. & Krueger, L.E., 1996) The new millennium brought a renewed interest in the concept of mentorship and a call to fully clarify its meaning and application in nursing (Dorsey, D.E., & Baker C.M., 2004). The Canadian Nurses Association (CNA) published its Guide to Preceptorship and Mentoring in October 2004. Their definition of mentorship are listed as: voluntary, mutually beneficial and usually long-term professional relationship (Canadian Nurses Association 2004).

What is mentoring?

Mentoring can be a formal or informal partnership where an experienced NZOHNA member assists the professional and personal development of a less experienced NZOHNA member. It is a mutually agreed relationship.

There are many definitions but the following describe it well:

"Mentoring is to support and encourage people to manage their own learning in order that they may maximise their potential, develop their skills, improve their performance, and become the person they want to be."

(Parsloe, Eric, Oxford School of Coaching and Mentoring)

A mentor is “someone who provides an enabling relationship that facilitates another’s personal growth and development. The relationship is dynamic, reciprocal and can be emotionally intense. Within such a relationship the mentor assists with career development and guides the mentored through the organisational, social and political networks”

(Queensland Government - Mentoring Framework, 2006).

“Mentoring is a powerful form of learning alliance between people outside the reporting line. The mentor helps the mentee with the quality of thinking about their self-development and career management; and in doing so, learns him/herself”

(CAMEO : the Coaching and Mentoring Encyclopaedia)

Models of mentoring

The mentoring literature has identified different approaches to mentoring which can be broadly grouped into an instrumental versus development approach. Jennifer de Vries suggests, rather than thinking of these as discrete categories, it is more helpful in terms of understanding what happens in practice, to place them on a continuum. Through her model she seeks to clarify the role of the mentor and the purpose of the mentoring relationship.

Mentoring Continuum



De Vries (2011b) sees mentoring at the instrumental end of the continuum being characterised by a senior colleague mentoring a junior colleague with the intent of assisting their career. Mentors use their knowledge and experience to teach and/or advise the mentee how to succeed. An unequal power relationship is at play at this end of the spectrum. However, with developmental mentoring De Vries sees that the mentoring relationship is “characterised by a more open ended

Journey with the mentor provides a safe, supportive yet challenging learning environment, marked by critical reflection on both the part of the mentor and mentee. This mentoring exhibits

mutuality and collaborative partnership working on a broader range of issues identified by the mentee” (de Vries, 2011b).

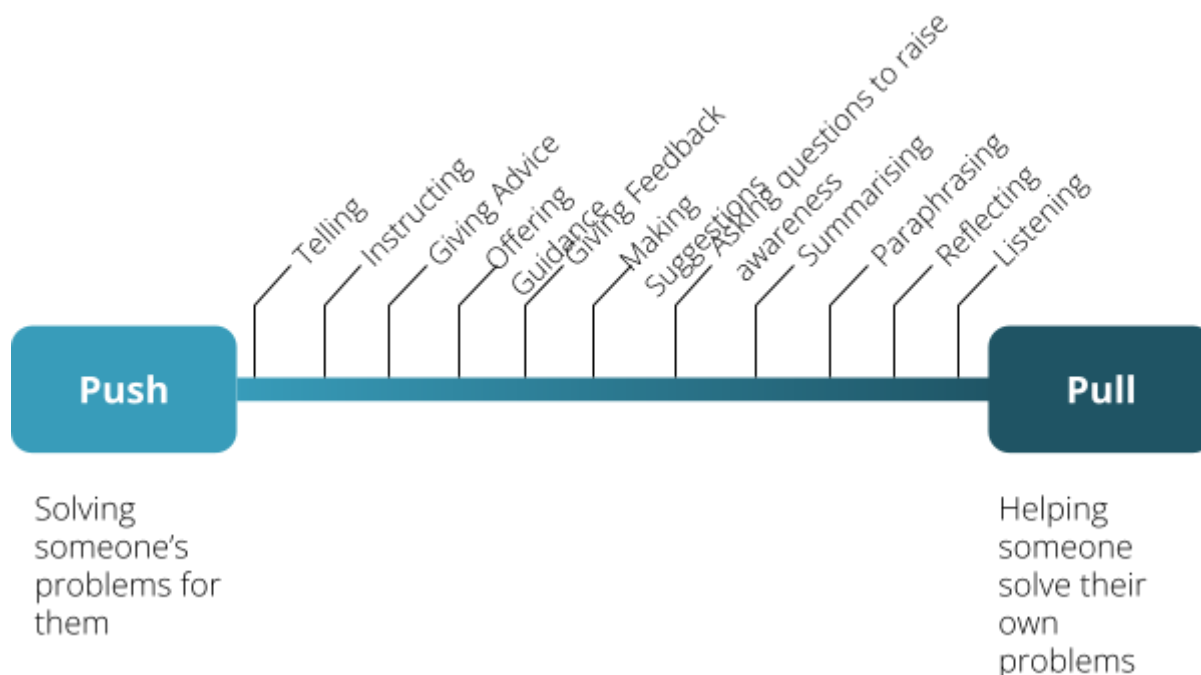
After extensive work and research in the mentoring field in Australia and internationally de Vries saw the importance of linking the mentoring relationship to organisational change. Coining the term “bifocal approach” she examined how the focus could be on both the close-up vision, the shorter-term solution of developing individuals and the distance vision, the longer-term transformational organisational change. (de Vries,2011a,). This approach positions the mentor as a partner for change. Consequently, she extended the continuum to illustrate transformative mentoring

Another mentoring model from the work of David Clutterbuck represents the various roles and approaches that he sees as being part of the mentoring relationship. They range across a spectrum of activity, from directive through to non-directive, and can be applied across a spectrum of approaches that span from stretching through to nurturing.



While developmental mentoring sits most appropriately within the non-directive area of the mentoring spectrum, the mentor will need to be able to use both stretching and nurturing approaches as appropriate. An effective mentor will adjust their approach to meet the needs of the mentee at any point during the relationship.

Directive and non-directive behaviour within mentoring



Formal and informal mentoring arrangements

Formal mentoring is undertaken through structured programmes which are endorsed by NZOHNA whereas informal mentoring partnerships are initiated between individuals. Key differences include:

Formal Mentoring	Informal Mentoring
Facilitated and supported by the organisation	Develop on their own and are not part of a structured programme
Connected to a strategic objective	Individual goals but not necessarily strategically aligned
Measurable outcomes	Unknown outcomes
A review/evaluation process exists	No formal review of effectiveness
Provides a co-ordinator, training and on-going guidance and support for participants	Often without training or support
Open access for all who qualify	Needs to be initiated by the mentor or mentee. Can occur naturally and not be labelled as such
Strategic matching of mentors and mentees	Self-selection of mentors and mentees

Mentoring relationships lasting a set period of time (eg. 9-12 months)	Flexible and can change in response to emerging goals or events. May be occasional or long term
Organisational recognition of commitment and dedicated time	Often unrecognised and may be more difficult to timetable

Informal mentoring relationships are based on mutual identification or attraction are unstructured and focus on the mentee achieving long-term career goals. In contrast, formal mentoring relationships are more structured in purpose and duration and usually involve organizational support. (Kilcher & Sketris, 2003). Typically, this would be a situation where a nurse is socialized with a more experienced colleague for support. (Kilcher & Sketris, 2003).

Mentoring Programme Structure

There are several different ways the structure of formal mentoring programmes can occur. The following provides a brief overview of some of the options:

1. One-to-One Mentoring

This usually involves a relationship between two people with one person having more experience in areas relevant to the other person's development needs. For example, a mid-career academic may mentor an early-career academic to develop their capability in research, teaching, administration and Nursing procedures. Or an Occupational Health Business manager may be mentored by another Manager to build skills in managing people and resources. This is usually the model that is prevalent in many formal mentoring programmes.

2. Peer to Peer Mentoring – 2 people

Peer mentoring involves knowledge sharing and supportive relationships between people at the same level or career stage. The purpose of peer mentoring is to support colleagues in their professional development and growth, to facilitate mutual learning and to build a sense of community. Peers or colleagues can provide each other with critical mentoring functions including communication, mutual support and collaboration.

This should not be hierarchical, prescriptive, judgmental or evaluative. An example could be two branches of NZOHNA meeting to discuss how they overcome some of the challenges of coordinating administrative services or early career researchers meeting to bounce ideas off each other and share strategies for dealing with transitioning to an expert role in occupational health careers.

3. Group Mentoring

Group mentoring involves a group of individuals who engage in a mentoring relationship to achieve specific learning goals. There are many ways to approach group mentoring:

3.1 Facilitated group mentoring

Facilitated group mentoring allows several people to participate in a learning group and to benefit simultaneously from the experience and expertise of a mentor or mentors. The richness

of the experience multiplies as each group participant brings personal experiences into the conversation. The mentor/facilitator asks questions to keep the dialogue thought provoking and meaningful, shares their own personal experiences, provides feedback and serves as a sounding board. One model is for there to be one mentor with several mentees in the group. Another alternative is that there are several mentees in the group and there is a facilitator.

3.2 Peer-group mentoring

Peer-group mentoring brings together peers with similar learning interests or needs. The group is self-directed and self-managed. It takes responsibility for crafting its own learning agenda and for managing the learning process so that each member's learning needs are met and everyone derives maximum benefit from each other's knowledge, expertise and experience. Each participant presents a problem or issue. The other members of the group respond to the problem or issue presented. Thus, the collective wisdom of the group is harnessed to solve problems and improve practices, and value is created for all group members. Peer mentoring groups can vary from 2-8 depending on the purpose and outcomes desired. Meeting times for peer to peer mentoring is usually arranged by the participants with support given in terms of process, resources and discussion guidelines.

Peer coaching groups could be an integral part of the NZOHNA group, this could be implemented via zoom meeting, given the geographical nature of the Association

4. Team mentoring

Team mentoring offers a methodology for facilitating the learning of an intact team. (or Branch) Together the individuals making up the team articulate mutual learning goals and work simultaneously with one or more mentors who guide them through a deliberate and deliberative process to facilitate their learning. The mentoring process allows the team to be supported and to learn from each other's experience and knowledge.

5. Bifocal mentoring

Bifocal mentoring transforms mentoring programmes from being a career boost for individuals to a change strategy designed to benefit mentees, mentors and the association. It places a premium on supporting mentors in their role. Rather than seeing mentors as benevolent colleagues, bifocal mentoring programmes engage directly with mentors and encourage the establishment of developmental two-way mentoring relationships where mentors become intended beneficiaries of the programme. Senior mentors are brought together to "zoom out" to the bigger picture systemic issues revealed through the collective stories of their mentees, and challenged to become advocates and change agents (de Vries, <http://jendevries.com>).

6. Reverse mentoring

Reverse mentoring occurs when a younger, less experienced person mentors a more senior person (in terms of age, experience or position) in a specific skill – usually technology based eg, in computing and internet communications. It can also be gender or diversity based.

The key to success in reverse mentoring is the ability to create and maintain an attitude of openness to the experience and dissolve the barriers of status, power and position. Reverse mentoring provides an opportunity to build relationships informally across the generations and/

or difference to make use of in-house expertise, and to educate/inform the senior partner regarding issues in the organisation.

What are the benefits of mentoring?

Research findings over the last 25 years demonstrate positive outcomes for career success and satisfaction for both mentors and mentees (Kram, 1985; Matthews, 2003).

Mentors will have greater career success and have faster promotion rates than non-mentors. Similarly, mentees in NZOHNA have a stronger sense of ownership within the association; feeling more connected in their work environment; and receiving more adequate information about the research, teaching and service expectations in their work area (Ryan, C & M. Guillemin, 2012).

Mentored members will also have potential to report higher levels of career satisfaction and research has shown a positive correlation between participating in mentoring and receiving higher salary levels and greater mobility within an organisation.

Benefits will vary from person to person but the benefits commonly reported from other programs include aspects of the following:

Potential benefits for mentees:

- Increasing professional self-confidence and self-awareness
- Accessing mentor's accumulated knowledge and expertise
- New insights into own behaviour and practices
- A sounding board for new ideas and/or working through challenges
- Obtaining a role model
- Increasing work and personal satisfaction
- Acquiring skills and knowledge
- Enhancing career development opportunities
- Increasing legitimacy in organisation
- Expanding networks and increased visibility
- Encouragement, support, different perspectives and constructive feedback
- Reducing feelings of isolation
- Increased competence
- Increased confidence and sense of security
- Decreased stress
- Expand networks
- Leadership development
- Insight in times of uncertainty

Potential benefits for mentors:

- Satisfaction in serving altruistically and supporting the development of others
- Satisfaction of being able to transfer skills and knowledge accumulated through extensive professional practice
- Increased enthusiasm and self esteem
- Opportunity to enhance mentoring, coaching and communication skills
- Opportunity to re-examine own practices, attitudes and values
- An expanded network of colleagues
- Learning from the mentee's experience and knowledge

- Professional recognition for skills and expertise while gaining fresh perspectives and opportunity for staying abreast with emerging issues.
- Enhanced self-fulfilment
- Increased job satisfaction and feeling of value
- Increased learning, personal growth and leadership skills
- Motivation for new ideas
- Potential for career advancement

Potential benefits for NZOHNA:

- Strengthens organisational culture and increases collegiality by building a community and encouraging staff to work together across disciplines and professions
- Supports succession planning and contributes to performance, development, and talent attraction and retention
- Provides opportunities to pass on best practice, encourage new ideas and maximise the potential of NZOHNA members
- Improves motivation and work satisfaction
- Supports the alignment of NZOHNA strategic objectives with individual and team efforts.
- Increase ability to recruit
- Decrease attrition
- Increased commitment to the organization
- Development of partnership and leaders

Many businesses have established mentoring programmes to meet specific local needs and objectives. There are, however, some best practice principles to be considered that are outlined below.

Foundation Principles for Mentoring Programmes

The following are some principles for implementing formal and informal mentoring programmes within NZOHNA:

- Each mentoring programme should have a programme sponsor to facilitate resources and have oversight of the process and outcomes
- The mentoring programme should be consistent with, and supported by existing policies regarding equity, ethics and inclusion
- There should be a clear goal statement for the programme
- Participation in a mentoring programme should be voluntary for both mentors and mentees
- There should be resources for both mentors and mentees regarding roles, responsibilities and support for the mentoring relationship
- Both mentors and mentees should attend existing training opportunities to develop a successful mentoring practice
- There should be guidelines for the mentor/mentee matching process that is consistent with the goals of the mentoring programme
- There should be ongoing support/assistance for both mentors and mentees and ideally an independent check in during the programme with both parties
- Mentees should be able to refuse a suggested mentor and request another if initially mismatched
- The mentor should be outside the mentees direct line of management/ supervision

- The mentoring relationship should be a private, non-reporting relationship regarding the content and conversations
- There should be ongoing evaluation and improvement of the programme without compromising the confidentiality of the mentoring relationships
- When possible there should be an annual plan – ie, NZOHNA executive plan on a one page opportunity for mentoring programme coordinators to share outcomes, best practice and resources – ie, a Community of Practice approach.

When setting up a mentoring programme there are several issues and questions to be explored. The following table is a guide for use by

Components	Issues to be considered when developing a mentoring program
Leadership & Structure	<p>Issues</p> <ul style="list-style-type: none"> • Assessment and need – individual and association culture • Purpose and objectives • Formal and less formal system • Stakeholder involvement • Responsibility – committee/advisory structure • Voluntary • Programme partners • Barriers and boundaries to mentoring • Conceptual framework and process/procedures/forms • Length of mentoring time • Inclusive or exclusive participation • Resource availability • Where to pilot • Mentor/mentee categories/target groups • Confidentiality • Equality and cultural requirements • Communications <p>Questions to consider</p> <ul style="list-style-type: none"> • What are the Association needs that a mentoring programme would address? • For the mentee? • For the mentor? • For the Association? • What stakeholders need to be involved in designing and governing the mentoring programme? • What resources are available to support the programme? (budget, program coordination, time allocation, training, support materials etc) • How will issues around equity of access to the programme and fairness in processes and procedures be addressed • What is the communication plan for all stakeholders during the mentoring programme?

<p>Programme Coordination & committees</p>	<p>Issues</p> <ul style="list-style-type: none"> ● Coordinator/s roles ● Administration process ● Receiving/evaluating mentor applications ● Receiving/elevating mentee applications ● Facilitating mentor/mentee matching ● Mentoring training ● Mentoring support ● Mentoring reports ● Mentoring matching <p>Questions to consider</p> <ul style="list-style-type: none"> ● How will the programme be coordinated and by whom? (eg dedicated programme coordinator) ● What are the coordinator/committee roles and responsibilities? ● What time commitment will be involved? (eg estimated duration of the programme, frequency of mentoring, mentoring meetings, completing feedback/reporting requirements and involvement in other programmes activities such as conferences, training etc) ● What will be the process and criteria for mentor matching? ● What training and support is needed to assist both mentor and mentees?
<p>Selection of Mentors</p>	<p>Issues</p> <ul style="list-style-type: none"> ● Criteria for mentors ● Characteristics and attitudes ● Training and refreshers ● Numbers/workforce groups ● Guidelines ● Checklists/forms ● Roles and responsibilities ● Reference resources <p>Questions to consider</p> <ul style="list-style-type: none"> ● What is the process for recruiting and selecting appropriate mentors? ● Are guidelines and support documentation available for mentors?
<p>Selection of Mentees</p>	<p>Issues</p> <ul style="list-style-type: none"> ● Criteria for mentee ● Characteristics and attitudes ● Numbers/member groups ● Guidelines ● Goals and responsibilities <p>Questions to consider</p> <ul style="list-style-type: none"> ● How will mentees and programme participants be selected? (e.g notification of opportunity, voluntary application, selection criteria reference, matching of skills etc) ● Are guidelines/checklists and support documentation available for mentees?



<p>Mentoring relationship</p>	<p>Issues</p> <ul style="list-style-type: none"> ● Preparation ● Initial ● Ongoing ● Separation ● Checklists ● Forms ● Recording ● Reporting <p>Questions to consider</p> <ul style="list-style-type: none"> ● What should be the configuration/structure of the mentoring relationship (eg peer to peer, group mentoring, mentoring circle?) ● What checks are in place to support and monitor the stages of the mentoring relationship
<p>Review and evaluation</p>	<p>Issues</p> <ul style="list-style-type: none"> ● Mentoring relationship ● Mentee progress ● Mentoring and mentee experience ● Participation notes ● Costs ● Overall mentoring program <p>Questions to consider</p> <ul style="list-style-type: none"> ● What processes are in place to review the progress of the mentoring programme ● What processes are in place to evaluate the mentoring relationship outcomes for the individual mentee? ● What processes are in place to evaluate the overall effectiveness of the mentoring programme?



Potential pitfalls in establishing a formal mentoring programme

Potential Pitfalls	Causes	Possible Remedies
Being a new "buzz word" rather than being an integral part of the Association	<ul style="list-style-type: none"> Not doing the groundwork or communicating adequately 	<ul style="list-style-type: none"> Needs to be planned and in line with other NZOHNA strategies. Requires commitment from the executive team to be effectively communicated. Needs to be linked to strategic goals
Lack of understanding of what mentoring is/isn't	<ul style="list-style-type: none"> Ineffective communication/promotion 	<ul style="list-style-type: none"> Review communication/promotion strategy and program introduction process
Scepticism of non participants	<ul style="list-style-type: none"> Lack of understanding of the proposed and expected outcomes of the programme. 	<ul style="list-style-type: none"> Review communication strategy Consider introducing a feedback process
Under resourcing	<ul style="list-style-type: none"> Lack of commitment from executive team Inadequate planning Other priorities 	<ul style="list-style-type: none"> Engage members in a "hard sell"
Mentor/mentee has not proven satisfactory Breakdown in relationship of mentor/mentee Mentors do not recognise their limitations	<ul style="list-style-type: none"> Ineffective selection process Ineffective introduction on role and process of mentoring Lack of effective guidelines for the programme Unrealistic expectations Personality clashes between mentor and mentee Failure to comply with mentor agreement Lack of time commitment 	<ul style="list-style-type: none"> Review Selection criteria Review program instruction process and training Ensure ongoing instructions and monitoring are in place Review the mentoring agreement in conjunction with individuals concerned ? if mentoring agreement should cease A new mentoring agreement may be required
Time Management	<ul style="list-style-type: none"> Mentoring program not sufficiently streamlined Unrealistic expectations of the program Lack of commitment to the program 	<ul style="list-style-type: none"> Discuss the problems being experienced Review process and make necessary adjustments Look at priorities and degree of commitment to the process

Mentoring programme is not achieving the success expected	<ul style="list-style-type: none"> • Unrealistic expectations • Too soon for benefits to be apparent • Not linked to attainable goals • Going too big too soon • Evaluation criteria is not effective/measurable 	<ul style="list-style-type: none"> • Review the purpose of the programme and the success indicators • You need to keep the programme small (conduct a pilot) and then carefully review the programme and make necessary adjustments • Invite participation
No interest in mentoring programme	<ul style="list-style-type: none"> • Not involving key stakeholders • Ineffective communication/promotion strategy • Too many work pressures 	<ul style="list-style-type: none"> • Review programme and ensure that it is endorsed from the executive • Gain input from key stakeholders and program champions • Modify programme accordingly and communicate changes made

Characteristics of effective mentoring

Effective mentoring relationships are driven by the mentee

Critical components are:

- Trust
- Open communication
- Setting standards and expectations

Effective mentors

Characteristics include:

- Commitments to own learning and development
- Self awareness and behavioural awareness
- Willing to commit to and make time for the mentoring relationship
- A genuine interest in mentee's growth and development
- Specific job-related skills and expertise
- Prepared to share knowledge and own experience (including lessons learned and mistakes made where relevant)
- Discreet and observes strict confidentiality
- Good interpersonal skills
- Objective, supportive and honest
- Treats the mentee as a colleague and acts as professional role model
- Recognises the limits of their own expertise and experience and clearly communicates that, the refers the mentee to other professional when appropriate (appendix a useful contacts)

- Seeks to understand and is respectful of the beliefs, personal attitudes and values of others – even if different
- Prepared to take the initiative in raising problems and difficulties with the partnership, however elementary they may seem
- Is on time for meetings with the mentee and gives adequate notice if the meeting is to be postponed. Also ensures uninterrupted time
- An awareness of different learning styles
- The role of the mentor will, to a large extent, be determined by the goals of the mentee
- Confidently model competent practices
- Collaborate with and advocate for the mentee
- Be sympathetic and respectful
- Have consistent approach and clear expectations
- Facilitate the mentees introduction in the organizations
- Collaborate in the assessment of learning needs and review learning goals for feasibility
- Provide encouragement and guidance to the mentee

Roles and Key skills

- Rapport building
- Listening, questioning and responding thoughtfully and flexibly
- Reflecting and providing an independent, objective viewpoint
- Providing both support and constructive criticism
- Coaching eg, teasing out an issue or problem with the mentee and supporting them to identify solutions
- Encouraging the exploration of ideas and risk taking in learning
- Challenging negative intentions or behaviours
- Challenging assumptions and encouraging alternative thinking
- Alert to sponsorship eg, able to point out potential opportunities and arrange introductions
- Being a sounding board – someone to talk to about an issue, test ideas
- Providing technical/professional knowledge and expertise
- Assisting the mentee to clarify career goals and promotion opportunities and to provide advice on strategies for fulfilling these goals and opportunities
- Follows through on agreed tasks
- David Clutterbuck, a leading researcher on mentoring, has carried out a number of studies on what makes mentors effective and the summary of the mentees responses are below;
- They reinforce rapport at each meeting
- They hold back from giving their own experience until the mentee has fully explored their own issues
- They summarise during the discussion but ensure mentee summarises at the end
- They make use of good penetrating questions
- They challenge and encourage when the need arises
- They talk less than 20% of the time and make use of silence to ensure the mentee has sufficient reflective space to consider the implications of an insight
- They give considered advice when it is asked for

Effective Mentee

As the mentoring partnership focuses primarily on the needs of the mentee, the mentee should take responsibility for driving the mentoring relationship. This includes:

- Being clear about their goals and how the mentor could support them
- Arranging meetings and setting the agenda
- Completing the necessary pre work
- Completing agreed follow-up activities.

Characteristics include:

- Committed to the mentoring relationship and focused on attaining their goals
- Discusses with the mentor what they want to get from the relationship and the type of guidance and support that would be helpful
- Realistic about what the mentoring relationship can deliver
- Prepared to be challenged, try new approaches and take risks
- Receptive to feedback and coaching
- Shows initiative
- Potential to perform at a higher level
- Aware of own strengths and weaknesses and willing to discuss failures and successes
- Willingness to apply learning back in the workplace
- Respects and maintains confidentiality throughout and following the mentoring relationship
- Respects the beliefs, personal attitudes and values of others - even if different
- Respectful of the mentor's time and resources
- Respectfully gives feedback to their mentor on what is working well or not so well in their mentoring relationship
- Is on time for meetings with the mentor and gives adequate notice if the meeting is to be postponed
- Follow through on agreed tasks.
- Participates actively in the programme (becomes an active learner and colleague)
- Co-assess specific learning needs and co-determine learning goals
- Adhere to NZOHNA policies and mission

Roles and key Skills:

- Listening actively
- Questioning
- Reflecting
- Reframing
- Focus on learning and commitment to own development

Development Offerings for Mentors/Mentees

NZOHNA will offer several workshops to enhance the mentoring/coaching relationship and skills. It is strongly recommended that all new mentors attend an appropriate workshop such as:

- Developing a successful mentoring practice.
- In addition, the following workshops could be useful:
- Coaching conversations: the fundamentals
- Coaching conversations: developing people and potential.

Getting Started

Before finding a mentor, it is very important to think about your development needs. What do you want to achieve through the mentoring relationship?

- Career development?
- Development of specific skills?
- Research?
- Teaching?
- Expanding networks?
- Enhancing work life integration?
- Understanding organisational culture?
- Increasing work and personal satisfaction?
- Other? eg, Evolve, APR

Once you have clarified what you want to achieve, now consider what you hope a mentoring relationship might bring to help you do this. There are likely to be many ways in which a mentor could help you, but by considering this question, you can identify what is most important to your current situation and ambitions. Here are some things that you might want to include:

- Expert knowledge in my specialist area
- A sounding board for my ideas
- Motivation to stretch myself
- Help clarifying my direction
- To learn skills I need to build to help me improve
- Someone who'll believe in me, and help me stick to my chosen path
- Inspiration to do my very best
- Validation that I'm heading in the right direction and choosing the right approach
- Sponsorship - someone who'll open doors, and help me network with other people in my field.

To think more about your specific goals and consider how you would like a mentor to support you with these refer to Appendix C – Defining Mentee's Expectations

Who can be a Mentor

In the selection of mentors, it is important to ensure that they have the necessary skills and expertise for mentoring, which according to Neary (2000a) include, coaching, counselling, facilitating, setting standard, assessing and giving feedback. Other writers and researchers

identify similar lists of skills. Such lists initially appear simplistic as a whole range of expertise is required to undertake the mentorship role, and this can usually be developed through appropriate educational preparation.

Finding a mentor

Once you have worked out what you would like to achieve from the mentoring relationship you will be ready to consider potential mentors.

There can be advantages in having someone from a different Branch of NZOHNA as they can often provide an independent view and offer fresh perspectives. However, this will depend on the purpose for the mentoring relationship. For example, if you identified research capability as your development need, then you may need to find a mentor from within your own area. If you identified strategic leadership as your development need, then prospective mentors could be from any area of the NZOHNA, provided they have relevant leadership skills and experience. Keep in mind that mentoring is not a “one-size-fits-all” solution and you may have multiple mentor relationships to address your various development needs.

A great mentor does not necessarily have an impressive title. Be aware that those who are in senior positions are often in high demand as mentors for people on formal leadership programmes. A great mentor will be someone who has the time, commitment and expertise to support you with the goals you have identified.

Formal mentoring programmes

Formal mentoring programmes will always have a clear system for mentor matching and you will be asked for information to assist with this.

The leadership development/mentoring coordinator will usually be the one to approach prospective mentors and to explain how the programme works and why they have been approached. You should not do this yourself unless it has been agreed with the programme co-ordinator.

Mentor Matching

There are a variety of ways mentees can be matched with mentors ranging from mentees identifying and approaching their own mentor from their own knowledge base to a co-ordinated matching process where the mentees’ development needs are considered by a team against a database of actual or potential mentors.

It is essential to consider the needs of both parties and in the case of a formal mentoring scheme the overall aims of the scheme need to be factored in. Skills and experience, development needs of the mentee, geography, availability, and potential personality match are other factors.

However, it should be noted that matching mentees with mentors who have identical personality types, work styles, or philosophical views can sometimes hinder achieving the goals of the programme or mentee as it can minimize the learning opportunity. The same can sometimes be the case with both gender and ethnicity depending on the intent of the mentoring.

When the alliance is learning driven, this, alongside appropriate recruitment and training can override the need for a totally compatible match. The overall aim is to create an empathetic and empowering mentoring relationship.

An important principle in a formal developmental mentoring scheme is that mentors and mentees should not be closely associated in their working lives nor should there be a direct reporting line due to the potential for conflict of interest. Objectivity and confidentiality need to be protected.

When a mentoring coordinator is doing the matching, it is good practice to confirm with the mentee the identity of the potential mentor. This way it is possible to share some context for the decision plus ascertain if there are any potential pitfalls in the match. Once there is agreement from the mentee then the mentor can be approached.

Refer to Appendix J for a flow chart that depicts a best practice process in a formal mentoring matching.

Informal mentoring arrangements

If you are initiating a mentoring partnership yourself, you will need to find a mentor. Consider who might have the relevant skills and experience in the areas you have identified.

Strategies you can use to find a mentor include:

- Asking your I manager or colleagues for their suggestions
- Utilising your existing contacts and networks to identify people:
- Who have achieved what you would like to accomplish (or something similar)
- Who have experience in the area you have identified
- Whose insight and perceptiveness inspires you
- If you approach someone and they are not able to accept ask them if they can recommend others

People often become nervous or hesitate when it comes time to ask someone to be their mentor because they think the other person will be too busy or that they will say no. By not asking you are denying the person the opportunity to make their own decision.

When you approach someone to be your mentor, make sure that you are clear about your goals, why you have chosen them and give them a sense of the commitment you are seeking from them. Usually people appreciate being asked as it is a form of recognition of their skills and expertise and even if they are unable to mentor you, they may be able to suggest someone who can.

Some approaches could be:

“I’m new to Occupational Health and would like to gain a better understanding of the culture and processes of the Position. Are you able to share some of your knowledge and experience?”

"I've identified time management as a skill that I would like to improve. I've noticed that you are very good at managing your time. Would you be willing to provide me with some guidance in this area?"

Phases of a mentoring relationship

A clear understanding of the cycle, stages and what is involved at each stage of the mentoring relationship is vital to obtaining the maximum benefit from having a mentor. Mentoring sessions can be face-to-face or virtual using technology.



Zachary, L (2012)

Stages in a Mentoring Relationship



The first meeting/session

The first meeting is an introductory one where you meet to share background information, values and needs. It provides an opportunity to decide if the relationship is likely to be rewarding and productive for both of you. The mentoring agreement (refer to Appendix D) provides a template for completion at the end of the meeting. It allows the expectations and boundaries to be agreed and goals to be set and recorded.

For your first meeting:

- Be prepared. Email your potential mentoring partner a brief introduction about yourself. The mentee may also send a summary of their objectives for the mentoring.
- Discuss the purpose of engaging in mentoring and clarify expectations of one another.
- It can be useful for the mentee to ask the mentor about their preferred communication styles eg, do they like to know detailed facts or prefer a broad overview? ... Are they a “listener” or a “reader” ...
- Seek agreement on objectives and measurable goals.
- Set a timeframe for the relationship – how long do you expect the relationship to last? Agree a date to discuss how the relationship is going, review progress and determine if there is a need to continue and if so any ways in which the relationship might be enhanced.
- Agree meeting frequency, duration and mutually acceptable location keeping in mind the need for confidentiality. Remember mentoring is voluntary and there is a need to respect the mentor’s time.
- Define boundaries eg, what can be discussed, any issues that are off limits, what the mentor is willing to assist with, what information remains confidential.
- Agree on how the relationship can be concluded. It is recommended that both the mentor and mentee discuss the terms for exiting the relationship and agree upon a “no blame, no explanation” exit to the relationship on good terms at any time if either party requests it. By discussing the end of the relationship at the outset, you will minimise the potential stress of concluding the relationship when the time comes.
- Use the mentoring agreement to record your decisions.

Developing and maintaining the mentoring relationship

Once the initial phase of the relationship has been completed and the purpose, goals, expectations and boundaries have been established, it is time to consider how you will continue to build and maintain an effective mentoring relationship. The success of the mentoring

relationship will depend on the ability of the mentor and the mentee to develop and maintain respect, trust and effective communication.

Development in a mentoring relationship means identifying and encouraging growth. To achieve this, it is important to:

- Commit to the mentoring ground rules you established at your first meeting
- Listen and communicate in a way that shows you respect your mentoring partner and that you value their time and ideas
- Take action, follow through on what you say you will do
- Ask for and be open to receiving feedback
- Respect the confidentiality of the mentoring relationship.

Ongoing meetings/sessions

Prior to each meeting the mentee should clarify what they would like to focus on and email this through, together with a brief report of progress since the last meeting if appropriate. This can help the mentor prepare and enables the most productive use of meeting time.

Suggested meeting format

- Social opening
- Recap how things have gone since the last meeting and outcome of any agreed follow-up
- Clarify the topics for discussion and the type of support the mentee needs at each point. eg, sounding board to process thinking? Providing direct advice? Providing feedback? Challenging perception?
- Explore agreed topics
- Develop or expand goals (SMART/ER)
- Summarise where to from here - any action that has been agreed to take before the next meeting
- Check with each other how useful the meeting has been and anything that would enhance future meetings
- Confirm date and venue for next meeting
- Mentee completes record of the session on their diary sheet (see Appendix F)

Issues to consider in mentoring relationships

“Finding a successful mentoring relationship is like dating: one cannot expect a perfect fit every time, and a good relationship takes work”

(Zerzan, 2009)

Common issues/challenges

Time/workloads:

This is often the most common difficulty experienced by mentors and mentees and includes:

- Finding common times for meetings
- Not allowing enough time to prepare and meet or not respecting your mentoring partner's time
- Not following through with agreed actions
- Access to mentor/gatekeepers

- Under-estimation of the time involvement
- Uninterrupted meetings.

Differences:

Sometimes the mentor and mentee do not feel at ease with each other.

This could be the result of different:

- Communication styles
- Problem solving styles
- Task orientation
- Degrees of ambition
- Priorities (research-teaching; private-public balance)
- Expectations of the relationship eg, balancing the relationship between the professional and the personal
- Diversity differences such as gender, age, ethnic or cultural differences may also occur.

Mentor directs too much:

The relationship needs to be dynamic, to grow and change as the mentee develops their confidence and skills, for the mentor to “let go”. The mentor needs to guard against:

- Telling the mentee what they “should do” rather than encouraging and advising them on available options, for example “have you considered ...?”
- Thinking there is only one right way to do things
- Being critical rather than providing constructive feedback
- Cloning

Unclear boundaries:

Mentors must always work within their area of competence and refer to other professionals when appropriate. They should also be careful not to misjudge the amount of autonomy and initiative that can be expected of the mentee at any point in time. Some issues that the mentee experiences are systemic and cannot be “solved” by the individual.

Mentor vs Counsellor

If the mentee requires assistance to resolve underlying personal issues, then counselling may be more appropriate to address this. In this situation, the mentor should discuss this with the mentee in a respectful and sensitive manner and if necessary, refer the mentee to an appropriate person (refer Appendix A - Useful Contacts).

Mentor vs Manager/Supervisor

The mentor should ideally be independent from the mentee’s manager/supervisor. The mentor’s role does not replace or duplicate the role of the manager/supervisor, nor does it extend to any responsibility for the mentee’s career, performance or advocacy on his/her behalf.

NB: It is however important to understand that if a mentee raises a serious issue, such as harassment, there is an obligation to ensure action is taken to disclose or resolve it. If this does

not happen the Mentor can legally be considered to have ignored the problem. First encourage the mentee to use existing channels to address the issue.

Dealing with conflict

When people work together, there are sometimes occasions when individuals disagree and conflicts arise. Conflict between mentors and mentees usually arises from misunderstanding, differing opinions or misinterpretation. If handled correctly, some conflicts can lead to productive learning and problem solving opportunities.

If conflict arises in your mentoring relationship:

- Identify the source of conflict
- Discuss the issues in terms of facts, rather than opinions
- Be considerate and respectful
- Avoid judgements
- Listen actively and be open to receiving feedback
- Be prepared to compromise
- Discuss how you will handle future conflicts should they arise.

IT is possible to have a couple of these challenges and still have an effective relationship. It is up to you to decide whether it is worth working through these issues or whether it is better to end the relationship and find an alternative mentoring partner.

Ending the relationship

Ideally there will be a planned separation because:

- Predetermined date has been reached
- Goals and objectives have been achieved
- Mentee or Mentor have a change in career or circumstance
- It is agreed that it would be beneficial for the mentee to work with a new mentor or within a peer mentoring relationship on aspects that are outside of the existing mentor's area of expertise.

If the relationship isn't working

If the relationship is not working it is possible that either you or your mentoring partner will decide not to proceed with the mentoring relationship. How the relationship is terminated should be one of the issues covered in the Mentoring Agreement discussed at the beginning of the mentoring.

If your mentoring relationship is part of a "formal" mentoring system your coordinator will assist you in appropriately terminating the relationship and finding you an alternative mentor if required.

If your mentoring relationship is an informal one, the "no blame, no explanation" clause in your Mentoring Agreement will allow you to conclude the relationship smoothly.

It is recommended that in ending the relationship you:

- Focus on the positive – recognise the contribution your mentoring partner has made and what you have gained from the relationship
- Clearly communicate that you wish to end the relationship and if appropriate, explain the reason.

Planned separation and redefinition

Some mentoring relationships extend over months, or even years, whereas others last for much shorter periods of time. The mentoring relationship should only continue as long as both parties are able to commit to the relationship and it is meeting the agreed purpose and needs expressed in the Mentoring Agreement.

It is important for both the mentor and mentee to regularly assess and review the mentoring relationship. There may come a time when the relationship is no longer productive for the mentor or mentee and it should not be left to dwindle away. Occasionally, some people find they have become friends and drift into a more informal relationship without conscious redefinition.

If you have reached the end of the agreed time frame or the relationship has fulfilled its purpose it is important to think about closure in your last meeting. This might include:

- Reflect and acknowledge what you have learned from each other
- Discuss where to from here for the mentee
- Redefine your relationship if appropriate - consider any ongoing relationship you might have as colleagues.

Evaluation

The evaluation of the mentoring program closes the loop with the original proposal for mentoring. Its main purpose is to assess whether the objectives of the scheme have been met and whether the scheme has generally had a positive impact. Effective evaluation clearly shows you whether the time and effort invested has been “worth it”, whether continuation of the programme is desirable, and whether any aspects of the programme design require changing. Things that can be considered in the evaluation include:

- Specified skills development
- Career plans
- Workplace flexibility (job placements/secondments, promotions, turnover)
- Completion of projects/assignments
- Feedback from mentors/mentees
- Feedback from managers/supervisors
- Cost/Benefit analysis.

Competencies of a Mentor

Comprehend

- recognize mentor roles and responsibilities
- interpret formal mentoring process

- apply adult learning principles to mentoring relationship
- analyse career and other professional competencies
- implement problem solving activities to recognize and reconcile different and perhaps conflicting priorities of a mentoring relationship and
- respond appropriately to a variety of needs

Relate

- initiate and foster a mentoring relationship utilizing sound interpersonal and communication skills
- engage in a learning partnership
- utilize open-ended questions and other communication strategies to deepen communication with mentees
- provide a safe and non-judgmental environment for mentees to express ideas and concerns
- provide timely support and understanding when the mentee experiences setbacks

Facilitate

- support mentees in goal identification and objective setting
- assist mentees in developing their action learning plans
- assist mentees in meeting objectives and other professional deadlines
- encourage participation in social and networking events
- provide opportunities to expand mentees professional network

Inform

- share knowledge about professional role and
- share knowledge on institutional /organization goals and values
- share knowledge on program goals and values
- provide professional expertise based on own subject areas
- support reflective career practice
- role model diversity

Challenge

- provide constructive feedback for mentees related to progress in meeting objectives and overall professional development
- assist mentees to identify areas for improvement
- encourage mentees to set ambitious or stretch goals in action learning plans

Reflect

- assist mentee to develop critical reflective professional practices
- role model reflective practice
- provide assistance for professional problem solving and conflict resolution
- encourage reflection on progression in competencies

Motivate

- role model risk taking
- share past successes and challenges
- support mentee's self-empowerment initiatives
- sustain mentee's commitment to the relationship and achievement of goals
- celebrate successes together
- promote mentees successes with others

Envision

- visualize mentee as mentor
- support and encourage career planning (short and long term)
- contribute to succession planning

Competencies of a Mentee

Respect

- value the mentor's knowledge and insights
- use the mentor's time and efforts wisely
- possess self-respect-this may be an emerging characteristic but the establishment of a mentoring relationship is easier to establish when a mentee has some degree of personal confidence
- give and receive feedback in a professional manner

Initiative

- demonstrate self-directed learning by identifying and prioritizing learning needs
- share learning needs with the mentor and give him/her time to plan and find resources to meet your needs
- engage in goal setting to ensure learning needs are met and time is used effectively
- prepare in advance for meetings with your mentor

Integrity

- follow through and be accountable for implementing action plan
- value differences and be open to new ideas
- honour your commitment to the mentoring relationship

Communication

- build relationships with mentor and other mentees
- listen actively
- reflect critically before and after meeting with your mentor about your motives, passions, attitudes, thoughts, feelings and behaviours

Independence

- manage the process of implementing and evaluating your learning action plan
- prepare for the termination of the mentoring relationship - acknowledge your mentor's contributions to your learning
- plan to contribute to the mentorship process by mentoring someone in the future

Other uses for mentoring competencies

Mentor and mentee competencies can also be helpful to:

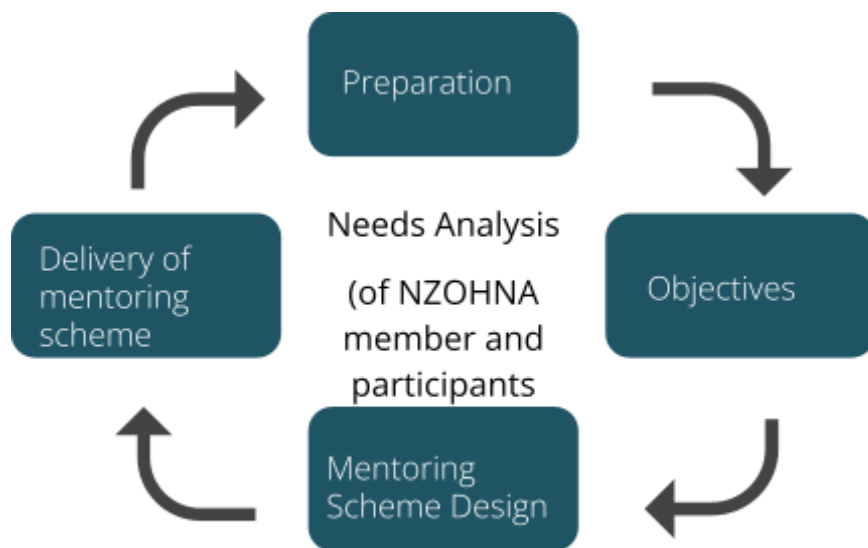
- clarify the skill set each mentor has to offer when participating in a mentoring relationship
- minimize the risk of error during the mentorship matching process
- help identify career progression paths for the mentor and the mentee
- help maintain standards within a formal mentorship program
- engage the mentor and mentee in self-assessment and planning learning activities
- engage reluctant individuals and stakeholders to participate in building a mentorship culture
- facilitate ongoing development of formal programs within their learning institution organization.

(Ahern, 2003; Clutterbuck, 2005)

Evaluation

The evaluation of the mentoring program closes the loop with the original proposal for mentoring. Its main purpose is to assess whether the objectives of the scheme have been met and whether the scheme has generally had a positive impact on yourself or business. Effective evaluation clearly shows you whether the time and effort invested has been “worth it”, whether continuation of the programme is desirable, and whether any aspects of the programme design require changing. Things that can be considered in the evaluation include:

- Specified skills development
- Career plans
- Workplace flexibility (job placements/secondments, promotions, turnover)
- Completion of projects/assignments
- Feedback from mentors/mentees
- Feedback from managers/supervisors
- Cost/Benefit analysis.



Klassen & Clutterbuck, 2002

When and what to evaluate, timing and confidentiality are factors to consider. Refer to the Evaluation checklist in Appendix K.

Section 2

What is Coaching?

“Coaching is defined by a collaborative endeavour between a coach and a client (an individual or group) for enhancing the life experiences, skills, performance, capabilities or wellbeing of the client. This is achieved through the systematic application of theory and practice to facilitate the attainment of the coach’s goals in the coach’s context.”

(SAI Global Ltd, 2011).

“Coaching can benefit people where they have to make a significant, usually short-term transition in a particular skill, competence or behaviour. Coaching will normally have specific goals and a set time to achieve these within. There are various forms of coaching depending on what the individual hopes to achieve. These might be skills coaching – where experts in a particular discipline or knowledge area pass on this information; performance coaching which deals with the behavioural aspects of workplace performance and executive coaching which is often poorly defined but may span performance and personal transformation.”

Leader/Manager as coach

A key capability for leaders/managers in NZOHNA is that of “coaching and developing others”. The ability to know when to take a “coaching approach” with team members enables the strengths, talents and skill levels of people to be leveraged so that individuals can achieve their own and team goals.

Coaching is essentially about a dialogue, or conversation, that helps individuals find answers and access what they know; it is about learning and change (Zeus and Skiffington, 2001, p 3). Leaders/managers need to hold a developmental and an achievement mindset so that individuals can perform in their current roles, increase their effectiveness, as well as have a developmental focus on learning that will prepare them for future career moves and transitions. The same intentional achievement and developmental mindset should also be applied to the team as a collective entity.

Ideally leader/manager coaches should look beyond their own departmental interests and short-term results to help develop the potential of their direct reports. This requires an environment that welcomes and supports the practice of a coaching approach/culture and of distributed leadership such that those in leadership roles are not expected to “fix everything” or have all the answers.

In addition to mentoring programmes, there is support for improving leader/manager capability in “coaching and developing others” through workshops offered annually by NZOHNA through a contracted resource

.

All new leader/managers are expected to attend:

- Coaching conversations: the fundamentals

Process workshops.

More experienced leader/managers, should attend the workshop:

- Coaching conversations: developing people and potential

Executive coaching

Executive/senior leader coaching is a “collaborative, individualised relationship between an executive and a coach, the aims of which are to bring about sustained behavioural change and to transform the quality

of the executive’s working and personal life” (Zeus and Skiffington, 2001,

- Coaches are often requested when an executive team member needs to:
- Test the feasibility of a potential strategy scenario
- Test assumptions regarding external realities and opportunities
- Provide feedback on 360° assessments
- Identify strengths to promote effectiveness and blind spots that may impede progression
- Enhance creativity
- Refine/hone a leadership capability
- Support work-life integration.

The resources in Section 3 of this document are also applicable for improving leader/manager coaching skills.

It is envisaged a more specific and substantial Guide To Coaching will be developed in 2018.

Section 3

Mentoring and Coaching Model

The WHOA to GO Model – A framework for a coaching conversation
(NZ Coaching and Mentoring Centre, 2004)

- W**hat’s happening now?
- H**ow would you like it to be different?
- O**ptions – exploration of alternatives
- A**ction – commitment to action



“It is helpful to have a structure and process for regular coaching and mentoring conversations”

Effective Coaching and Mentoring Questions

(NZ Coaching & Mentoring Centre, 2004)

Here are some useful questions when using the WHOA to GO model. The focus is on getting individuals to self-review and to arrive at their own conclusions.

What’s happening now?

- What is happening at the moment? What’s going on?
- How do you know that is the case? Give me an example.
- When does this happen? How often does this happen? Be as specific as possible.
- What makes this a problem?
- How does this make you feel?
- So what’s the key issue for you?
- What effect does this have?
- What’s not happening now that you think should happen?
- Which parts of this are within your power to change and which aren’t?
- What other factors are relevant or who else is relevant?
- What is their perception of the situation?

How would you like it to be different?

Set the goal

- How would you like things to be different?
- What would you like to happen that is not happening now or What would you like not to happen that is happening now?
- Describe what you would be doing, seeing, feeling, hearing...
- What difference would that make?
- What effects will that have?
- How will that be of value to you? To anyone else?
- What stops you from having that right now?

If the problem is one that is not possible for them to solve, you may need to focus on the person rather than the problem eg, So how is this making you feel? How would you rather be feeling about this? What can you do to achieve that result? OR focus on the parts of the problem that they should be taking responsibility for or are within their power to change.

Options - Elicit the options or alternatives and explore the implications

- What could you do to get that result?
- What are the options? Don’t worry about whether they are realistic at this stage.
- What actions are needed to overcome the “what stops you” obstacles?

- What approaches/actions have you thought about already? Seen used? Used yourself, in other situations?
- Has this ever happened before? What did you do then?
- What might help?
- Which options do you like the most? Which options are of interest to you?
- What are the benefits and pitfalls of these options?
- What is a short term solution? A long term solution?
- Would you like some ideas from me?
- What resources are available to you?

Action wrap up and commitment to action

- Identify what will be needed to accomplish the chosen option / alternative
- What will you need to do / learn / find out about?
- What are the next steps?
- When will you take them?
- What might get in the way?
- Is there a way of overcoming that obstacle?
- What resources are available to you?
- What support do you need?
- How and when will you enlist that support?
- What will you commit to doing by when and how?

Clarifying Questions

- In what way?
- What makes you say that?
- How do you know that?
- What specifically...?
- How many...? Who exactly...?
- Which...?
- How does...?
- When does this happen?
- What do you mean by...?
- Can you give an example?

Follow-up and Feedback/forward for progress meeting and coaching moments

Ease	<ul style="list-style-type: none"> ● Put the person at ease ● Check where they are at ● Is it a convenient time to talk? ● Identify a focus for the discussion – set an agenda and establish timing ● How would you like to use our time today
Engage	
Essentials	<ul style="list-style-type: none"> ● Agree on their goal or need for the session – “What do you want from me on this one?” What do you want to achieve by talking this through?” ● Clarify and draw out detail ● Obtain the essential facts regarding actions/behaviours completed or not completed ● Remember to ask permission to change the direction of the conversation or to get more personal
Insights	<ul style="list-style-type: none"> ● How do they feel about the task/actions that were completed or not completed? ● Opportunity for insights
Give	<ul style="list-style-type: none"> ● Encourage the development and progress of the person ● Use the power of positive feedback ● Encouragement assists relationship building, self-confidence and learning
Assess	<ul style="list-style-type: none"> ● Assess and explore the learning from the situation ● Share perspectives, facts and opinions ● Reframe and challenge assumptions
Gauge	<ul style="list-style-type: none"> ● Gauge the impact and implications ● How does what has happened, or been learned affect others in the organisation? ● Do new processes, procedures or other documentation need to change?
Explore	<ul style="list-style-type: none"> ● Explore possible new actions or objectives ● Agree to options for future direction ● Gain commitment to action ● Summarise together what it all means ● Complete any documentation if appropriate ● “check out” and review
<ul style="list-style-type: none"> ● Remember to be: Fair, accurate and non-judgmental 	

Coaching and Mentoring Skills

Listening

Active or Reflective Listening

During your conversations you will be able to have a more positive impact by using a range of skills that encourage others to talk openly. One of the most important skills is the ability to listen well. Active or reflective listening is:

- Restating the essence of what the other person is saying in your own (and fewer) words, while you are listening to them.
- Particularly focusing on putting words to their feelings and the meaning that their story has for them.

Communicate to the person that their message has got through by using reflective listening and THEN respond. In essence, active attention is directed at processing and understanding as fully as possible:

- What is said
- How it is said
- What is meant
- What is not said
- The context in which it is said

“There are those who are listening and those who are waiting to speak”

Privately rate yourself on the following:

Listening Skills	Never	Sometimes	Often	V.often	Always
I listen only to what I want to hear					
I jump to conclusions					
I finish people's sentences for them					
I fill any silence with words					
I let my mind wander while being spoken to					
I think about what I will say next while others are talking					
I continue to do something else while being spoken to					

Questioning

Avoid using closed questions, ones that result in a yes or no answer. It is best to use clarifying questions, ones that elicit more information.

- In what way?
- What specifically....?
- What do you mean by....?
- Can you give an example?
- What makes you say that?
- How do you feel about that?
- How do you know that?
- Who exactly....?

It is also effective to use thinking questions, ones where the person gets to think about their own thinking. For example:

- How long have you been thinking about this?
- How often do you find yourself thinking about this?
- How might you think differently about this?
- How much time do you think about the problem or think about the solution?
- Can you see any gaps in your thinking?

Reframing

Reframing is simply changing the meaning of an event or experience, in the way that placing a picture in a different picture frame somehow changes the look of it.

Reframing is useful in coaching and mentoring situations because sometimes people get stuck with a particular way of perceiving a situation which may be disabling rather than enabling them.

Reframing helps the person to see things differently and subsequently come to different conclusions, or feelings about the event or experience.

The mentor/coach's ability to reframe this situation for the person provides a new perspective and often a sense that things that seemed impossible may now be possible. Reframing isn't about pretending that everything is wonderful for the person. Instead, it provides more and varied ways for people to consider the problems they are facing and find easier ways to solutions that work for them.

Reframing can be broken down into two types – content and context.

Content Reframing

The content of a situation is the meaning that is given to it. The content of what the person is saying has a cause and effect structure.

“Making a mess of that presentation means I am useless at presenting.”

This statement is a generalisation, because taken in isolation the statement implies that from one single presentation a judgment can be made. When a person makes comments like this it can be helpful to ask questions like:

- According to whom?
- What might be useful about this experience?
- How else could you describe your behaviour in this situation?
- What can you learn from this experience?
- How would you advise someone who had just given the presentation you did?
- What did you do well?

The whole point is to help the person to consider the positive aspects of their own behaviour, to look at the situation from a whole range of different perspectives that may change the way they view the meaning they have given to it.

Context Reframing

It is a simple fact that any experience, event or behaviour has different implications depending on where it occurs. A person might say:

“I spent so much time on the detail that I just didn’t get it finished in time – I’m just too detail conscious!”

The context of a situation or event is about where it occurs.

This statement focuses on the negative aspect of a behaviour but there will be times when being detail-conscious

serves the person well. A useful way of reframing this for the person might be to ask:

- When might being detailed be helpful for you?
- Where could you use this skill in the future?

These questions get the person to focus on times when and where attention to detail is important. It can then help them to respond in a more positive way to what they see as a negative behaviour.

References, websites and further reading

Ahern, G.(2003). Designing and implementing coaching/mentoring competencies: A case study. *Counselling and Psychology Quarterly*, 18(4), 373-383.

to preceptorship and mentoring. Ottawa, ON: Author. Canadian Nurses Association (2004). *Achieving excellence in professional practice: A guide*

Clutterbuck, D. (2005). Establishing and maintaining mentoring relationships: An overview of mentor and mentee competencies. *Journal of Human and Resource Management*, 3(3),2-9.

Zachary, L. (2009). *The mentee's guide: Making mentoring work for you*. San Francisco, CA: Jossey-Bass.

Zachary, L. (2000). *The mentor's guide: Facilitating effective learning relationships*. San Francisco, CA: Jossey-Bass.

Appendices

Appendix A – Defining Mentee’s Expectations for the Mentoring relationship

Mentee’s Expectations
The reasons I want a mentor are to:
How can a mentor help me with my professional development?
How do I learn best?
I want my mentor and I to:
What skills, qualities and attributes am I looking for in a mentor?
What 2-3 things do I want to learn from a mentor?
I want my mentor and I to discuss?
What criteria would be useful in evaluating the success of the mentoring relationship?

Appendix B - Defining Mentor's Expectations for the Mentoring Relationship

Mentor's Expectations
The reasons I want to be a mentor are to:
How can a mentor help me with my professional development?
I want my mentee and I to:
I hope my mentee and I will discuss:
What knowledge/skills/experience do I have?
What interests do I currently have?
What other personal characteristics do I have that may be helpful?

Appendix C - Mentoring Diary Sheet

Mentoring Diary Sheet	
Date of Meeting:	
Topics discussed:	
Comments/reflections:	
Where to next?	
Actions?	
Resources?	
People?	
This sheet is confidential to the two persons involved in the mentoring relationship	

Appendix D - Mentoring Progress plan

Name:	Mentor:	
Development Goals:		
Objective	Strategies/Actions	Target Date
Resources Required	Measures	

Appendix E - Conversation Starters

Below are some suggested questions to help you have productive mentoring/coaching conversations

Getting Acquainted

- How long have you worked
- What projects are you currently working on.....?
- What do you enjoy most about your current positions?

General

- What actions have you taken since we last met?
- What do you want to achieve from this meeting?
- How useful has this meeting been? Does it meet your needs?
- Would it be helpful to talk about this issue again at our next meeting?
- Where do we go from here?

Career Goals

- Which areas would you like to develop in and why?
- What goals do you have for the future?
- What are you doing now or need to do to achieve these goals?
- How can I help you?

Skills and Knowledge

- What do you see as your strongest area of capability?
- What additional skills and knowledge would assist you to meet the expectations of your role?
- What strategies do you implement to manage competing priorities in your role?

Problem Solving

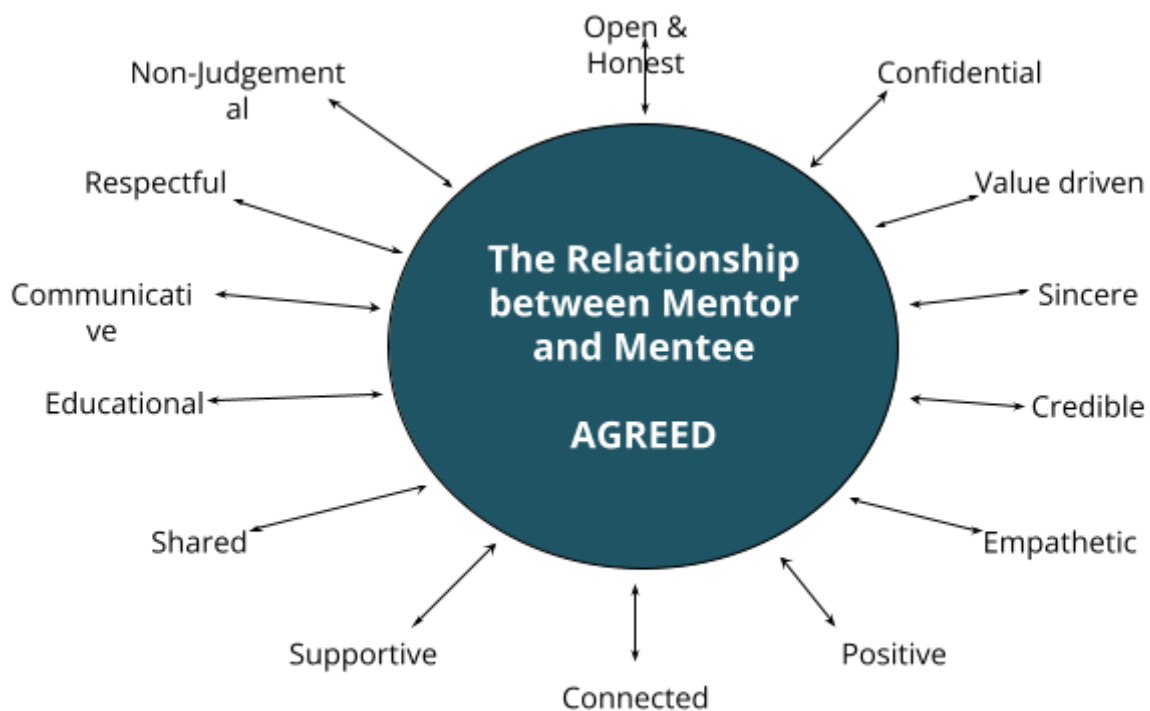
- What issues/problems are you facing at the moment?
- What have you done so far to address this issue?
- What results have you achieved?
- What obstacles have you encountered?
- What do you see as your options?
- Do you want input or suggestions from me?

Appendix F - Mentoring agreement

The Mentoring Agreement is an agreement between the Mentor and Mentee and acknowledges that this is a voluntary programme for both the Mentor and Mentee. The following is an agreement between the parties named below. We are voluntarily entering into this mentoring relationship which we both want to be a productive and rewarding experience. To minimise the possibility of confusion, we have agreed to the following:

- **Confidentiality** All information and content shared between the Mentor and Mentee shall be confidential
- **Expectations** It is expected that the Mentor will provide guidance and support based on the Mentee's development needs. Both parties will work together to identify the Mentee's professional goals and needs as well as developing a plan for achieving those goals.
- **Meetings** The Mentor and Mentee will meet monthly at a time and place (or online) that is mutually agreed. Meeting times, once agreed, should not be cancelled unless this is unavoidable. Meetings that are cancelled should be rescheduled. At the end of each meeting, we will agree on a date for the next meeting. Each meeting shall last for approximately one hour.
- **Length of Relationship** Our goal is to maintain this relationship for six months.

The Mentor agrees to be honest and provide constructive feedback while sharing insight on their own experiences. The Mentee agrees to be open to feedback that the Mentor shares and will respect the insight and experiences shared by the Mentor.



Skills needed by successful Mentors (Briggs, 2000).

Mentor name: _____

Mentor signature: _____

Date: _____

Mentee name: _____

Mentee signature: _____

Date: _____



Appendix G - Mentoring application form

I am applying to be a Mentor Yes / No	I am applying to be a Mentee Yes / No
Name	
Membership No	
NZOHNA Branch	
Email	
Contact Phone Number	
Preferred meeting style (zoom, in person)	
Company Name	
Number of years of OHN experience	
Qualifications and work experience:	
Knowledge and skills:	
What do you want to gain from participation in the mentoring programme? (Goals for a Mentee/Mentor)	

I have read the NZOHNA Mentoring Programme Fact Sheet and when matched, agree to signing the Mentoring Agreement.

Signature:

Date:

Mentor Branch endorsement (signature and name):

Date:

Appendix H - Mentoring Process

